

**SAP Training**



## TM310 Leave Administration



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Welcome to the BEACON SAP *TM310 – Leave Administration* training.

## Notes

## Prerequisites

Prior to attending this course you should have taken the following prerequisites:

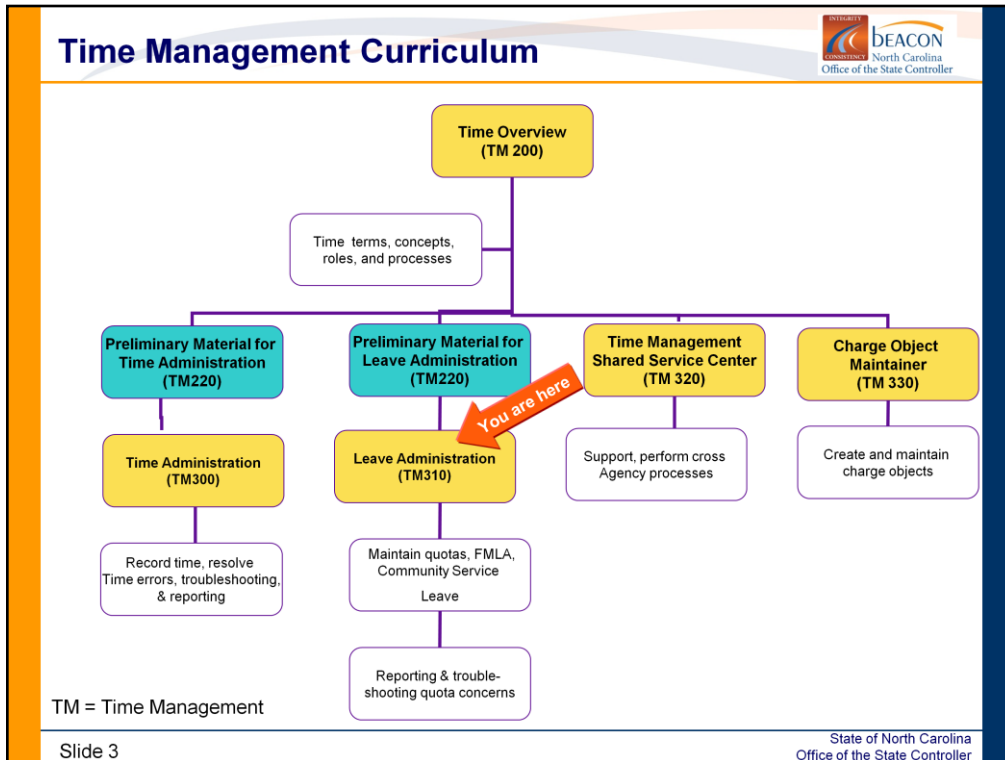
- BEACON Overview - BC100
- SAP Basic Navigation - BC110
- Time Overview – TM200
- Introduction to Leave Administration - TM210

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## Notes

There are four pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.



As noted in the pre-requisites this class is preceded by the web based course *TM210 – Introduction to Leave Administration*.

## Notes

## SAP - Welcome

Welcome to the Leave Administration course.

- Introductions
- Sign the Training Attendance Sheet
- Classroom etiquette
- Cell phones off
- No side conversations



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## Notes

The course introduction is an opportunity to get to know the others who are attending this class as well as agree on classroom courtesy. The instructor will inform you about the facilities and when the breaks will occur.

Please make sure you receive the credit you deserve for attending this class by signing the attendance sheet.

## Welcome: Strategy for Training

- Tell me**
- Show me**
- Let me**
- Support me**

### Concepts

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

### Demonstrations

Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF

### Exercises

Student will complete the exercises which allows for hands-on practice in class – HANDS ON

### Availability

Instructor will be available to answer questions while the students complete the exercises

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## Notes

The *Leave Administration* student guide provides a copy of the PowerPoint slides used during the classroom training. You will observe that space is provided for you to write notes. You can use the guide as a reference when you return to the workplace. For example you can use the exercises for practicing in the SAP Training Environment.

## Reference Materials

- Student Guide
- Exercise Guide
- Job Aids
- Other resources:
  - Online Help
  - Simulations
  - Work Instructions



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## Notes

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task. Simulations are available only for select transactions.

### BEACON Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

To access BEACON Help from any SAP screen, select the **Help > BEACON Help menu option**



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To access BEACON on line help:

- <http://help.mybeacon.nc.gov/beaconhelp/>

### Notes

### Your Training Responsibilities

- Attend the applicable training class
- Be actively involved and participate in training
- Practice after training
- Pass the Level 2 skills assessment



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### Notes

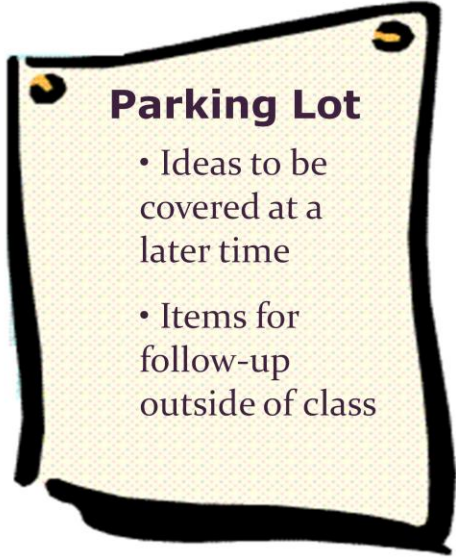
This course, as is true with all of the HR courses, is not designed for your specific Division or Agency procedures and policies. The training does not include all of the scenarios you encounter in your current job role. Instead, the courses in the Time Management curriculum are designed with two purposes in mind:

- To give you the basic knowledge and skills you need in order to perform your tasks in the SAP application as well as to perform any related business processes.
- To demonstrate how you can further develop your skills by using the classroom materials, Work Instructions, Online Help and practice sessions to continue your SAP education after training is completed.

As you can see, you play an active role in your training development. The BEACON SAP HR/Payroll training is designed to ensure that you have the information you need in order to perform your duties and responsibilities.



## The Parking Lot



- Ideas to be covered at a later time
- Items for follow-up outside of class

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## Notes

The *Parking Lot* will be used to record any concerns, expectations, and questions that cannot be answered during the class. If needed, your instructors will follow up with answers to questions that could not be answered in class.

When you think of a concern, ask the instructor. If the instructor /navigator cannot answer the question, it will be forwarded to the BEACON Training office. The Training Solutions Center will contact the subject matter experts to determine an answer and will notify the instructor of the answer.

The instructor will share the answer if it is received before the end of class. If an expectation or concern cannot be addressed in class, the instructor will place it on a parking lot, research it, and provide the class with a response at a later date.

## Course Map

Lesson 1: Overview

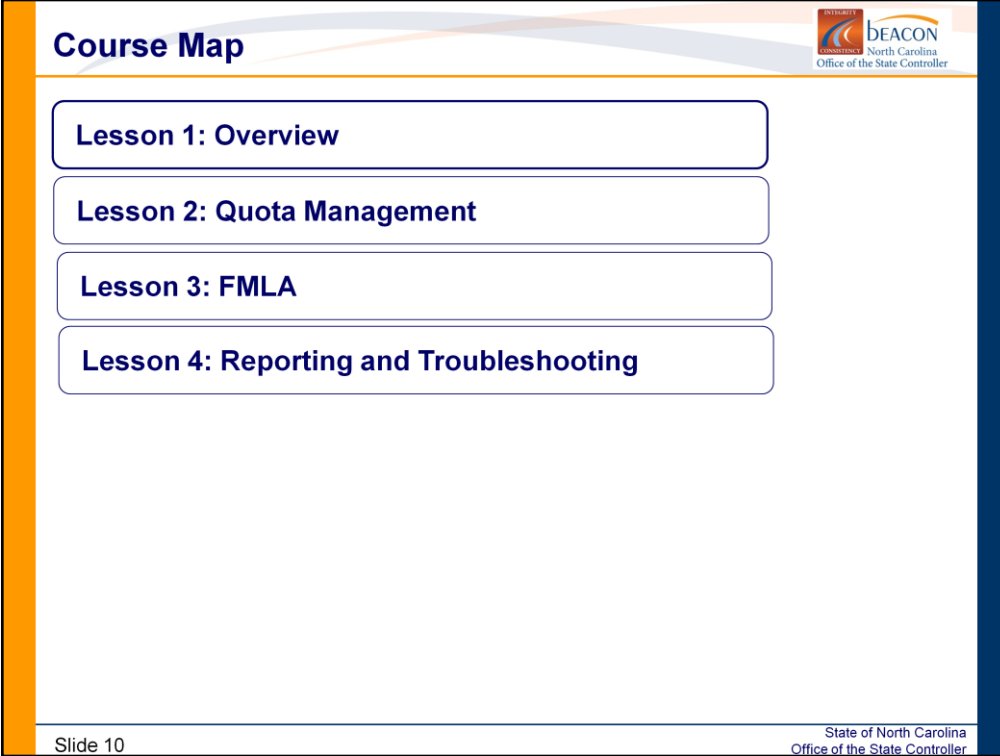
Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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## Notes

This course is designed to provide you with knowledge and skills necessary to perform Leave Administration in SAP.

## Course Objectives

Upon completion of this course, you should be able to:

- Describe the Quotas available to employees.
- Describe and execute the process for quota corrections.
- Describe and execute the maintenance of FMLA-relevant absences.
- Perform basic quota reporting and troubleshooting.




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## Notes

# Course Map



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Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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**Notes**

## Lesson Objectives - Overview

Upon completion of this lesson, you should be able to:

- List leave quotas in BEACON.
- List key changes:
  - Leave Hierarchy
  - Leave Offsetting
  - Holiday Behavior
  - Time Evaluation


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## Notes

## New Terms and Concepts

- Quota
- Quota Type
- Cross Application Time Sheet (CATS)
- Attendance/Absence Type (A/A Type)
- Positive Time or Negative Time
- Time Evaluation



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## Notes

**Quota** – A balance reflecting an employees entitlement for Leave.


**Quota Type** – 2 digit code in SAP that indicates the type of quota. eg., sick (15), holiday comp time (22).

**Cross Application Time Sheet (CATS)** – Acronym in SAP for the Cross Application Time Sheet

**Attendance/Absence Type (A/A Type)** – A code that reflects the nature of an employees absence, or attendance. Absence codes are for time off – sick, vacation, bonus, etc. Attendance codes reflect time worked - regular work, additional hours, make up time, etc.

**Positive Time or Negative Time** – Describes the requirement to enter all time worked and leave taken, or to record exceptions only.

**Time Evaluation** – Nightly Time Evaluation run applies time rules and readies approved time for use for Payroll processing.

Quota Types			
Quota Type	Quota Text		
10	Vacation Leave		
15	Sick Leave		
20	Overtime Comp Time		
22	Holiday Comp Time		
24	Travel Compensatory Time		
26	On Call Comp Time		
31	Advanced Vacation Leave		
32	Advanced Sick Leave		
40	Holiday Leave		
50	Bonus Leave		
61	Adv weather # hours owed		
65	Community Service Leave		
66	Community Service - Tutoring		
80	Received Shared Leave		
85	Military Leave (Training)		

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## Notes

Specific descriptions follow on the next pages.

Holiday Leave is the holiday that is due in the next 60 days, for positive time employees. A holiday absence will reduce the amount in the Holiday Leave Quota. Negative Time employees will not see an increase in their Holiday Quota in advance of a holiday.

Holiday Comp is earned when an employee works on a holiday.



## Notes

All absences recorded as '9000 - Approved Leave' will be subject to this Leave Hierarchy. The Leave Hierarchy reflects the order in which leave balances will be relieved when Time Evaluation encounters an entry for an Approved Absence. At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will only return a message 'no quota available' if it has checked each bucket and not found a balance to cover the absence.

The quotas will be automatically relieved in this order.

- 1) Holiday Comp
- 2) OT Comp
- 3) On-Call Comp
- 4) Travel Time Comp
- 5) Vacation
- 6) Bonus
- 7) Advanced Leave

For more information about OSP Leave policies, please refer to the OSP website:

<http://www.osp.state.nc.us/manuals/manualindex.htm>






## Notes

The Sick Leave Hierarchy represents the order in which the system will relieve quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are relieved when Time Evaluation is run.

## Positive vs. Negative Time

Employees entering time will be classified as either positive or negative time.

Employee Time Reporting Type	Description
Positive time/exception pay	Employees record all of their time worked and all of their exceptions such as leave taken each month.
Positive time/actual pay	Employees record all time worked and are paid based on actual time recorded. This applies to Temporary Employees.
Negative time	Employees only record variations from their normal schedule, such as leave taken. Only employees "not-subject to FLSA" can be negative time.



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## Notes

It is important to recognize the distinction between actual and exception pay.

**Actual pay** – Employee only receives pay for time reported. If no time is reported then no pay is received.

**Exception pay** – Employee receives full pay unless Leave Without Pay are reported.

**Positive time reporting** – Applies to all employees subject to Fair Labor Standards Act (FLSA)

**Negative time reporting** – Applies to all employees that are exempt from FLSA

### Leave Offsetting

**THE RULE:**  
**Leave is to cover the gap between hours worked and the minimum expected work hours.**

- When Approved Leave is taken in the same period where the employee has worked additional hours, the amount of leave taken will be offset with the additional work hours, and the leave that had been recorded will be restored to the employees quota for later use.

**Example:** A Positive Time employee with a normal 5 X 8 hour work schedule works 4 ten hour days and takes 8 hours of leave on Friday. In this scenario the 8 hours of leave will be restored to the employee's Approved Leave quota and the employee will be paid for 40 hours.

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For more information about the OSP Leave Offsetting policy please consult the Leave policies:  
<http://www.osp.state.nc.us/manuals/manualindex.htm>

### Notes

## Leave Offsetting *(continued)*



40 HOURS – MINIMUM  
REQUIRED WORK HOURS

Monday	Tuesday	Wednesday	Thursday	Friday
8 HOURS APPROVED LEAVE	10 HOURS WORKED	10 HOURS WORKED	10 HOURS WORKED	10 HOURS WORKED



Approved Leave, Sick Leave  
and Community Service Leave  
will be offset when the  
employee achieves his  
expected work hours in the  
same OT period in which leave  
was recorded.

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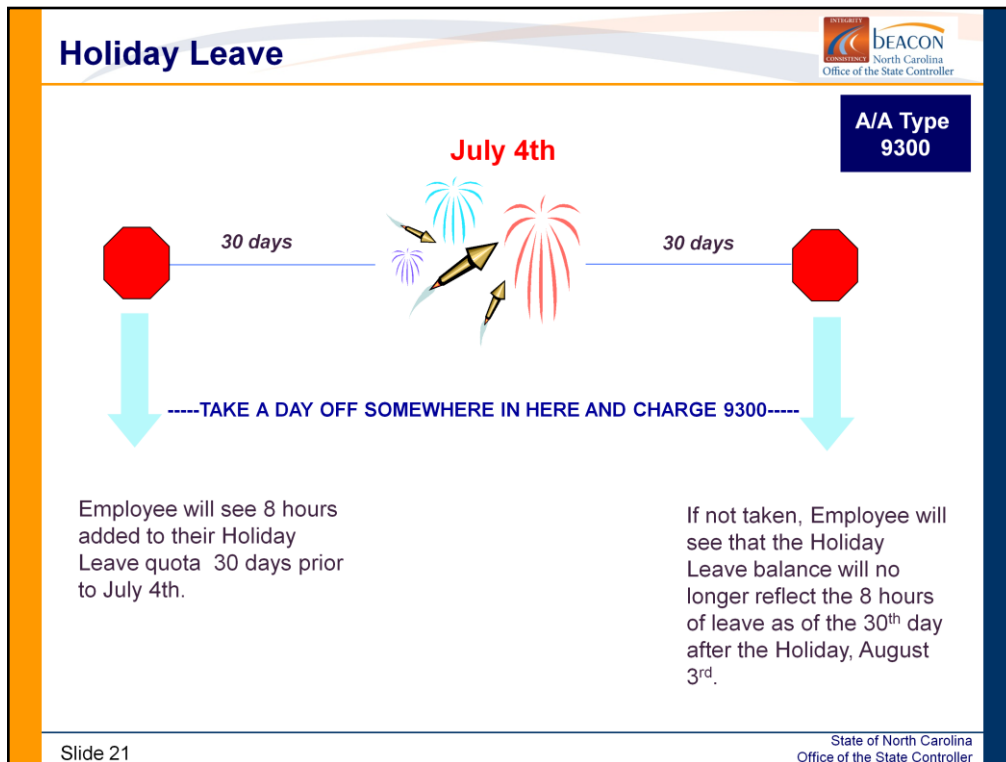
## Notes

Quotas with established limits will be offset:

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee's leave quota.

Leave restoration will be first taken, first restored. If a monthly employee takes Approved Leave in Week 1, and then a day of Sick Leave in Week 2, and then works an additional 8 hours in Week 4, the Approved Leave in Week 1 will be the first to be restored.

**NOTE:** Leave Offsetting is done within an OT period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the 7 day OT period. For 28 day employees, the entire 28 day period is subject to offsetting.



## Notes

### Scenarios:

#### For Positive Time Employees

Will see holiday leave appear in their quotas 30 days prior to the holiday

May take the holiday from that date forward, not to exceed 30 days after the holiday

May observe the holiday on the day it naturally occurs. This 60 day holiday period is designed to provide flexibility for agencies with 24x7 operations.

- If the holiday falls on a regularly scheduled work day, and the employee is off, the employee should record 9300, Holiday Leave.
- If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) will be converted to Holiday Comp Time and placed in the appropriate Leave quota.
- If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.

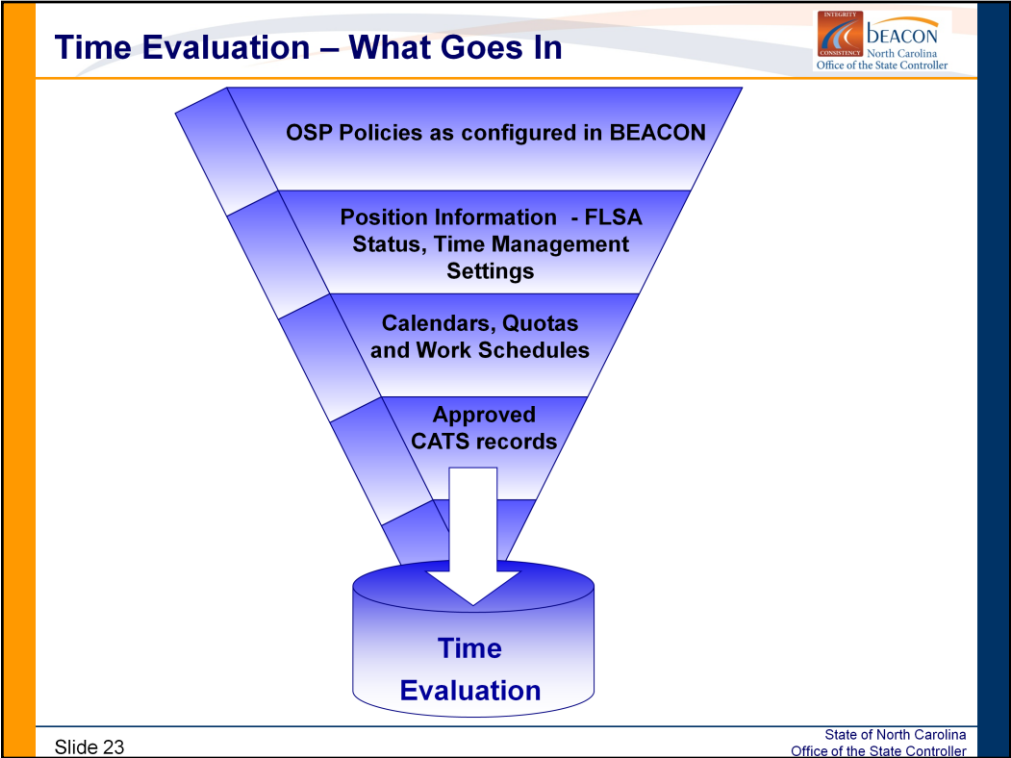


## Notes

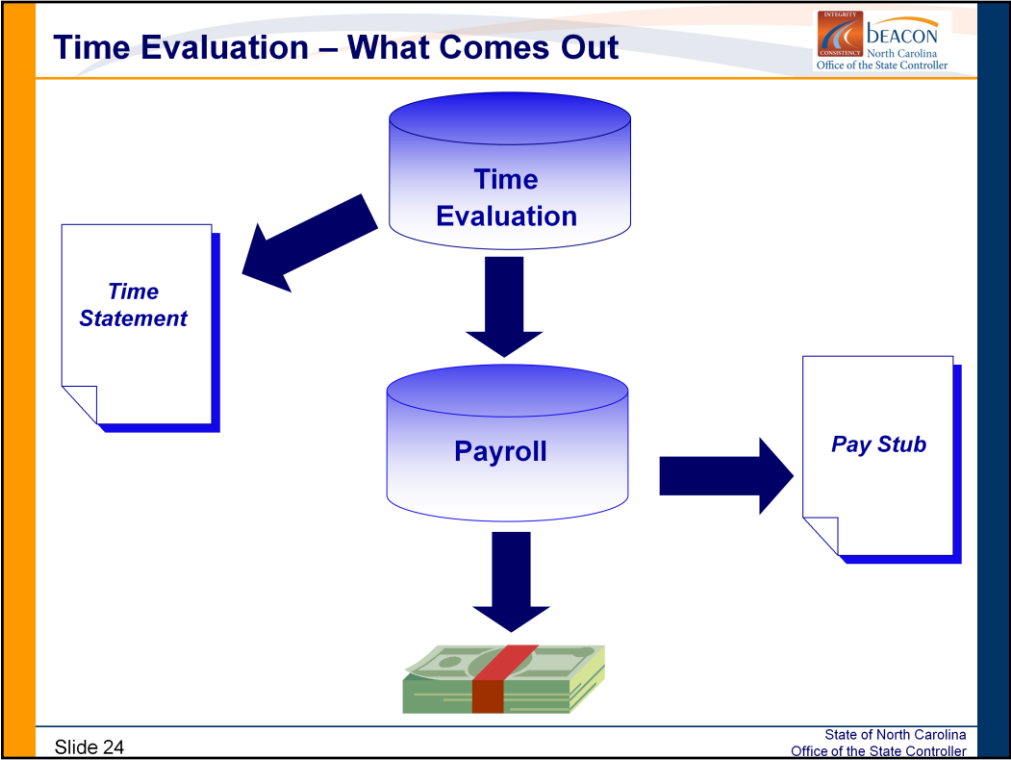
### Scenarios Continued:

For **Non-FLSA Subject** employees who record exceptions only:

1. The only exception for these employees is if they **WORK** on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.
2. Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employees work schedule.




**Notes**



**Notes**




**1:1 - Walkthrough**  
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- **Log On To SAP**
  - You need to log on to the SAP training client so that you can complete course exercises.
- **Instructions**
  - Use the steps and date provided below to log on to SAP in the classroom.
    1. Access the SAP Training portal web page.
    2. Enter the User ID and password that is assigned to your classroom PC.
    3. Click the Log on button.
    4. Click Yes to confirm the security message displayed.
    5. Click on the SAP GUI tab.
    6. Click on the training client specified by your instructor.
    7. Stop when you have reached the SAP Easy Access screen.


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## Notes

## Knowledge Check



T	F	Question
		1. Vacation is used before Comp Time in the Leave Hierarchy
		2. SAP automatically deducts approved leave based on the new OSP leave hierarchy policy.
		3. Holiday Leave (A/A 9300) must be recorded by all employees.
		4. Positive Time employees get their holiday leave 30 days in advance.



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## Notes

## Lesson Review

In this lesson, you learned to:

- List leave quotas in BEACON.
- List key changes:
  - Leave Hierarchy
  - Leave Offsetting
  - Holiday Behavior
  - Time Evaluation



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## Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

## Lesson Objectives

Upon completion of this lesson, you should be able to...

- View quotas.
- Modify quota balances.
- Describe Community Service Leave in BEACON.
- Convert quota from CSL to CSL-Tutoring.
- Describe Voluntary Shared Leave process at a high level.

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## Notes

## Quota Accruals

- **Who accrues?**
  - Employees with a employer/employee non-temporary relationship with the State
- **When do Employees Accrue?**
  - Positive time employees must record time worked or leave for 50% of the pay period to be eligible to accrue in that period
- **What counts for accrual?**
  - Any entry that puts the employee in a pay status for that day will count towards the 50% achievement
- **What do they accrue?**
  - Hours and minutes, in decimals
- **What is prorated?**
  - Annual Leave and Sick Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

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## Notes

Accrual date depends on the number of work days, as derived from the employee's work schedule.

- For example:
  - An employee works 5 days a week.
  - There are 21 work days for this employee, on this work schedule, in the current month.
  - The employee would accrue his leave when time is entered and approved through the 11th workday of the month \*.

Employees with intermittent LWOP could conceivably accrue on the last day of the month.

Any entry that puts the employee in pay status for that day will count as a 'day' towards accruing in that period.

\* Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.

## Accruals – When and How


**THE RULE:**  
**An employee will accrue their leave when they have achieved 50% of their payroll period.**

- Employees who are Positive Time must demonstrate that achievement by recording time.
- Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

**NOTE:** BEACON recommends weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

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## Notes

### Quotas – Recording Leave

- Employees accrue leave when the time has been earned based on approved timesheet entries. Leave may not be taken before it is earned. Time must be entered, approved and evaluated before the accrual will be done.
- Leave earned on the 15<sup>th</sup> may not be applied to an absence on the 10<sup>th</sup>.
- Quotas cannot be negative. Employees and Time Administrators cannot record more leave than the employee has available on that date.
- Leave Administrators have the responsibility to research Quota problems and make appropriate adjustments.

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**NOTE:** It is within the agencies discretion to permit a Leave Administrator to adjust the validity date. This would be unusual, but can be done. It is not standard practice.

### Notes



### Advanced Leave



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- Agencies may elect to Advance leave in accordance with OSP Policy. Typically this is rare and for a specific purpose, not vague or casual.
- A Leave Administrator, with management approval, would create an Advanced Leave Quota for the hours awarded.
- The Advanced Leave Quota will be consumed when the employee records an absence that draws on that Quota.
- The system will generate a Liability for the employee based on the hours taken. It will recover future accruals towards that liability until it is satisfied.
- The Advanced Leave Request form is available online.



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Advanced Leave is subject to the limits in the OSP Policy manual.

### Notes

## Advanced Leave - Recovery of Liabilities



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### Advanced Leave

- As leave is accrued, it will be used to satisfy an outstanding Advance Leave liability of the same type (i.e., vacation accruals will be used to pay back vacation advances).
- If an employee has an outstanding Advanced Leave liability, and works additional hours, the additional hours will be used to pay back the liability until it has been satisfied.

The recovery of liabilities is reflected on the Time Statement.


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## Notes

### Adverse Weather

- Absence due to adverse weather is entered using the Adverse Weather A/A type – 9545.
- During Time Evaluation this A/A type will cause the creation of an adverse weather liability.
- During subsequent Time Evaluation the system will check for the Adverse Weather Make-up A/A type – 9512 for additional hours worked, as well as regular hours worked in excess of the required minimum hours.
- The adverse weather liability will be reduced accordingly when either is present.



## Quota Overview Snapshot

**Selection tab lets user change date range**

**Absence quotas tab shows quota balances**

**Accruals tab shows quota generations & adjustments**

78197877  
Wednesday May  
1001 Agriculture Conservation Cost Center 18999999 AGRICULT  
FTN-FLSAOT Person WS rule D01N08 MTWHF-8;

Selection dates   **Absence quotas**   Accrual information   Attendance quotas

Totals row	AbQuotaTyp	Quota text	Unit	Entitl.	Rem.	Requested	Compens.
Σ	10	Vacation Leave	Hours	80.00000	80.00000	0.00000	0.00000
Σ	15	Sick Leave	Hours	80.00000	40.00000	40.00000	0.00000
Σ	40	Holiday Leave	Hours	24.00000	24.00000	0.00000	0.00000
Σ	65	Community Service	Hours	24.00000	24.00000	0.00000	0.00000

**Not in use**

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## Notes

The Quota Overview (PT50) transaction has several key tabs:

- **Selection dates** – tab allows user to choose the period of time they wish to view
- **Absence quotas** – tab shows quota types and their balances (shown above)
- **Accrual information** – tabs shows accrual information
- **Attendance quota tab** – not in use

On the Absence quotas tab there are several columns showing key values:


- **Entitlement** – quota employee is due during displayed period
- **Remaining** – quota left for use by employee

On the Accrual Information tab:

- **Generated** – calculated by the system and ready to be moved into employees quotas during next Time Evaluation
- **Transferred** – moved into employee's quota and available for use

## 2:1 - Instructor Demonstration

- **Quota Overview – PT50**
  - You wish to view an employee's quota balances
- **Required data:**
  - Personnel number – See exercise guide




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## Notes

## 2:2 - Walkthrough

- **Quota Overview – PT50**
  - You wish to check an employee's accrual rate for Vacation Leave
- **Required data:**
  - Personnel number – See exercise guide



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**Work Instruction:** Quota Overview – PT50

**Notes**

## Quota Adjustments

- Quota adjustments can be used to:
  - Correct quota errors
  - Advance leave
  - Convert Community service leave to community service leave tutoring
  - Administer voluntary shared leave\*
- Quota adjustments are done by selecting the Quota subtype and then entering the number of hours.
- Transaction – Maintain Time Data - PA61
  - Infotype 2013
    - » Subtype 10 – Vacation
    - » Subtype 15 – Sick Leave
    - » Subtype 31 – Advanced Vacation
    - » Subtype 32 – Advanced Sick

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## Notes

The list above is a partial list of Quotas. A complete list may be viewed in SAP.

\* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

**Quota Corrections Snapshot**

Absence quota type  Vacation Leave

**Change accrual entitlement**

Quota number  Hours

☒ Increase generated entitlement  
☐ Reduce generated entitlement  
☐ Replace generated entitlement

**Change transfer time**

Transfer

**Notes:**

- Choose Carefully: Increase or Reduce
- Always choose transfer immediately

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## Notes

Leave Administrators have the following options to choose that are *allowed* by the system:

- Increase
- Reduce
- Replace (do not use!)

The Leave Admin must also choose a transfer option – ALWAYS choose transfer immediately.

Transfer Immediately means that it will transfer with the next run of Time Evaluation.

Quota balance will reflect the change once Time Evaluation has been run.

## Holiday Quota Corrections

- If a Positive Time employee fails to record 9300-Holiday Leave within the 60 day period AND fails to record work time on the Holiday, the Time Administrator will see a Time Evaluation error message:  
“Holiday Not Taken”
- The Time Administrator should research the message to determine if the employee has not had the benefit of the holiday.
- If the employee has not had the benefit of the holiday, the Time Administrator will request that the Leave Administrator increase the Employee’s Holiday Comp Quota for the hours not taken.

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## Notes

Leave Administrators will not typically be looking at Time Evaluation Error Messages but they do have access to a transaction to do so.


If a Time Administrator makes a correction in the timesheet to show the holiday as taken, it will result in a retro calculation that will eliminate the message.

The only time action that will be required by the Leave Administrator is if the employee did not have the benefit of the Holiday. The Leave Administrator must reduce the Holiday quota by 8 hours for a holiday not taken and increase the Holiday Comp Quota by the same 8 hours.



## 2:3 - Instructor Demonstration

- **Quota Adjustment – Vacation Leave – PA61**
  - You need to increase an employee's vacation quota by 10 hours to correct an error.
- **Required data:**
  - Personnel number – See exercise guide
  - Infotype – 2013
  - Subtype 10




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## Notes

## 2:4 - Walkthrough

- **Quota Adjustment – Advance Leave – PA61**
  - You need to create an advance leave quota adjustment for an employee based on an approved request for 40 hours of vacation.
- **Required data:**
  - Personnel number – See exercise guide
  - Infotype – 2013
  - Subtype – 31



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**Work Instruction:** Advanced Leave – PA61

## Notes

**NOTE:** The creation of the absence quota doesn't create a liability. The absences recorded for the employee that use the Advanced Leave will create a liability from the Employee to the State.

## 2:5 - Exercise

- **Quota Adjustment – PA61**
  - You need to adjust an employee's sick leave balance to correct an error that occurred prior to Go Live
- **Required data:**
  - **Personnel number** – See exercise guide
  - Infotype – 2013
  - Subtype – 15



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**NOTE:** Normally, time balances should be adjusted through corrections to CATS entries if possible. At go-live, some quotas may need manual correction if the employee took leave between the date the file was submitted and the start date in the new system.

**Work Instruction:** Quota Adjustment PA61

## Notes

## CSL to CSL Tutoring Option

- Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring.
- Tutoring leave is taken in 1 hour increments
- Employees that elect tutoring must use A/A Type 9565

A/A Type 9560      Community Service Leave - 24 hours      Community Service Tutoring – 36 hours      A/A Type 9565

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## Notes


24 hours accrued annually

Must be used between January 1<sup>st</sup> and December 31<sup>st</sup> within the calendar year

May be used in any increment (down to one hour)

## 2:6 - Walkthrough

- **Convert CSL to CSL Tutoring – Quota Adjustment – PA61**
  - You need to convert an employee's 24 hours of community service leave to 36 hours of community service leave – tutoring.
- **Required data:**
  - Personnel number – See exercise guide
  - Infotype – 2013
  - Subtype – CSL – 65 and CSL – Tutoring - 66



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**Work instruction:** Quota Adjustments– PA61

**Notes**




As with the other topics in this lesson, the Voluntary Shared Leave process is administered with Quota Adjustments.

\* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

### Notes

## Voluntary Shared Leave Process



1. A Voluntary Shared Leave Event must be established:
  - Date of the event should reflect the start date of the employees confinement or disability.
  - No system check for eligibility
2. A Donation must be processed.
3. The Recipient must be credited.

**BEST Shared Services will manage donations when the Donor and Recipient are in different BEACON Agencies.**

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## Notes

A leave administrator will process leave donations within their agency.

Donations are usually Vacation Leave. If the Recipient is related to the Donor, the Donor may elect to donate Sick Leave.

For clarification on who may donate to whom and the limits on the amount of leave that may be donated, refer to the OSP Policy Manual online at the following URL:

<http://www.osp.state.nc.us/manuals/dropmenu.html>

Detailed work instructions are available on the BEACON Online Help site for the VSL process.

### Ending of VSL Events

- Unused leave, in excess of 40 hours, must be returned to ACTIVE employees, on a pro-rated basis at the end of the Shared Leave event.
- Leave administrators may manage the return of leave to Donors if all Donors are in the Recipient's agency.
- If leave is to be restored to people outside the agency, then the Leave Administrator must contact BEST Shared Services.
- The VSL Event must be ending by changing the To date filed in the VSL event.

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See the State VSL policy.

### Notes



## Knowledge Check

T	F	Question
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. Employees accrue on the 1st of the month.
<input type="checkbox"/>	<input type="checkbox"/>	2. Advanced Leave requires management approval.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. Recovery of liabilities is automatic.
<input type="checkbox"/>	<input type="checkbox"/>	4. Subtype 10 is Sick Leave.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5. Quota Adjustments are done through PA61.
<input type="checkbox"/>	<input type="checkbox"/>	6. Employees must formally elect the tutoring option.




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## Notes

## Lesson Review

In this lesson, you learned to:

- View quotas.
- Manage quota adjustments.
- Describe Community Service Leave in BEACON.
- Convert quota from CSL to CSL-Tutoring.
- Describe Voluntary Shared Leave process at a high level.



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## Notes


### Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting



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**FMLA** is the Family Medical Leave Act.

**Notes**


## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.

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## Notes

## New Terms and Concepts

**FMLA event**


- A qualified event under the Federal Law that guarantees an employee's job will be protected during an absence of up to 12 weeks.

**FMLA absences**

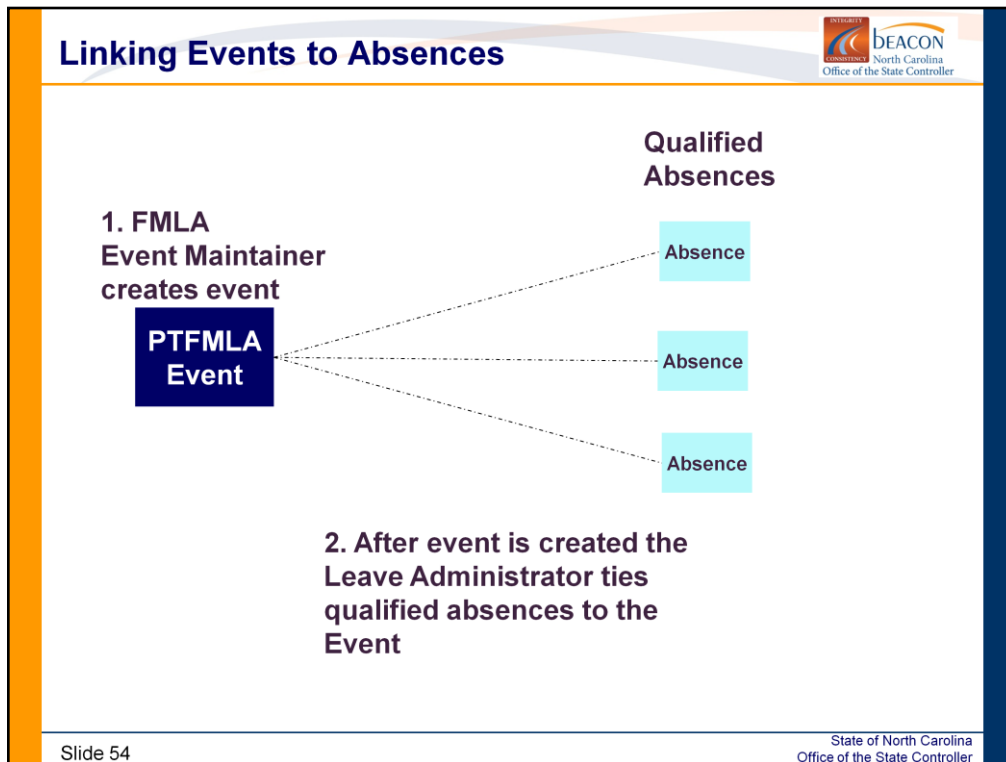
- An absence that falls during an employee's FMLA event period that is attributable to that event.

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## Notes



## Notes

There are two FMLA profiles:

- FMLA Maintainer
- FMLA Administrator

There is a security role – FMLA Event Maintainer – that may create FMLA Events.


All Leave Administrators may apply absences, but not all may create events.


Approved Leave, Sick Leave and LWOP absences may be applied to an FMLA event.

Paid or unpaid absences may be applied. Pay status is irrelevant.

Donated Leave under Voluntary Shared Leave (VSL) does not affect FMLA. Absences are recorded as Sick Leave and applied to the FMLA event, same as other absences.

## 3:1 - Instructor Demonstration

- **Create FMLA Event – PTFMLA**
  - You need to create a FMLA event in SAP based on an approved FMLA request by an employee.
- **Simulation:**
  1. Access BEACON help @ <http://help.mybeacon.nc.gov/beaconhelp>
  2. Select Human Resources.
  3. Select Time.
  4. Select the Simulation  button next to Processing FMLA Event.



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## Notes

Use the PTFMLA Simulation to demonstrate the creation of a PTFMLA event.

Simulations are available for key transactions. Simulations may be used as a practice tool or as a refresher as needed.

## 3:2 - Walkthrough

- **Apply Absences To FMLA Event – PTFMLA**
  - You need to apply absences for an employee on FMLA to their open FMLA Event.
- **Required data:**
  - **Personnel number** – Refer to instructor data sheet



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**Work instruction:** Processing PTFMLA Event - PTFMLA

**Notes**



## FMLA – Ending the Event

The FMLA event will end when either:

1. The 12 month rolling period has expired
- or
2. The **FMLA Event Maintainer** changes the end date.

A diagram showing a dark blue box labeled "FMLA Event". Below the box, the word "FROM" is on the left and "TO" is on the right, connected by a horizontal line with an arrow pointing from left to right.

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Changing the end date held in the PTFMLA To field will end (delimit) the event.

## Notes

## Knowledge Check

T	F	Question
		1. All absences during an FMLA event are FMLA relevant
		2. All Leave Admins may create FMLA events.
		3. An employee may be out greater than 12 weeks
		4. Voluntary Shared Leave has no effect on FMLA.





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## Notes

## Lesson Review

In this lesson, you learned to:

- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.



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## Notes

# Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting



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Notes

## Lesson Objectives

Upon completion of this lesson, you should be able to:


- Review Time and Leave entries with transaction CATS\_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.

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## Notes

## About Troubleshooting



**PRACTICE**  
This lesson is designed to introduce troubleshooting. After class be sure to practice and explore during practice in the Transition Centers.

**BE PATIENT**  
Troubleshooting is a skill that is honed over time – don't be alarmed if you don't feel like an expert at the end of class.

**IT GETS EASIER**  
As you become more familiar with the BEACON system, data, processes, and transactions your comfort with troubleshooting will increase.

**DON'T WORRY**  
The transactions discussed in this topic are displays and reports. They don't update or change data so running them will not "hurt" anything.

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## Notes

### Display Working Time – Quota Usage

Display Working Times, transaction CATS\_DA, allows for the review of an employee's time records for a specified period of time.

- It reflects time as it was entered. Changes to entries are reflected as additional lines on the same date.
- It displays A/A codes, amounts, premium codes, and audit details.
- It can be subtotaled by A/A types or searched by specific A/A types.

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### Notes


CATS\_DA will not display changes to the data that resulted from Time Evaluation.

Time Evaluation will offset leave taken in a week where the employee has exceeded their minimum expected work hours.

Leave that has been offset will show on the employee's Time Statement.

## 4:1 - Walkthrough

- **Display Working Times - CATS\_DA**
  - You wish to view an employee's working times in SAP.
- **Required data:**
  - Personnel number – See exercise guide



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**Work instruction:** Display Working Times – CATS\_DA

Items to demonstrate:

1. Display data
2. Subtotal Data
3. Change columns to display
4. Filter for a single A/A type

## Notes



## Time Statements



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**Beacon Time Statement**  
01/01/2007 to 01/31/2007

**Beacon Time Statement**

01/01/2007 to 01/31/2007

**Personal / Organizational Data**

Personnel Number	95301008	Cost Center	1800000000
Name	Anita INT22-1801-NC01-0-GB-1	Work Schedule	D01N08GN
Position	YOUTH TRANSPORTATION DRIV	Emp. Group	A- SPA Employees
Org Unit	Juv Justice Counselors	Emp. Sub. Group	B1- FT S-FLSAOT Perm
Personnel Area	1801-Juvenile Justice Delinquency	Months Of Service	
Sub Area	NC01- 7day Norm		

**Reported Hours**

Time Account	Hrs	Time Account	Hrs
Work Hours	0.00	Additional Hours	0.00
Paid Leave Taken	0.00	Leave Without Pay	0.00

**Calculated Hours**

Time Account	Hrs	Time Account	Hrs
Regular Time	0.00	Evening Premium	0.00
Straight Overtime	0.00	Night Premium	0.00
Time & Half Overtime	0.00	Weekend premium	0.00
Holiday Premium	0.00		

**Absence Entitlements**

Description	Beg. Balance	Accrued	Used	Paid	Expired	Offset	End Balance

**Leave Liabilities**

Description	Beg. Liability	Increased	Recovered	Ending Liability

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## Notes

The Time Statement is a summary of the employee's time in a given pay period, after Time Evaluation.

The Time Statement shows:

- Overtime
- Premium Pay
- Leave Accrued
- Leave Taken
- Leave Offset

The Time Statement is not a pay slip. It is a summary of time data for an employee as determined in Time Evaluation. It does not reflect compensation.

Payroll uses the data from Time Evaluation to generate paychecks.

### Time Statements *(continued)*

- Summary of all time data entered for an employee during a specific period
- ESS time users will be able to view time statements online.
- Time Administrator can print Time Statements for employees as needed.

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### Notes

Time statements may be printed individually or via a batch process by the Time Administrator.


Use Time Statement form ZTS0.

Time Statement can show:

- Leave that was Accrued
- Leave that was Offset
- Liabilities that were recovered
- Donations that were applied
- 9901s (Aging comp time balances)
- Position Settings

The Time Statement is the first place to go when an employee identifies a potential error.

## Troubleshooting Quota Concerns



Transaction Code	Description	Usage
CATS_DA	Display Working Times	To review employees recorded working times and leave usage (minus offsets)
ZNCTIME	Time Statement	To review final period leave usage, leave liabilities, and leave offsets
PA51	Display Time Data	Used to review service dates and other key time infotypes
PT50	Quota Overview	Check balances and accrual details

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The SAP transactions listed in the chart above are useful for troubleshooting quota concerns.

## Notes

## 4:2 - Instructor Demonstration

- **Troubleshooting Improper Leave Deduction – CATS\_DA & ZNCTIME**
- **Scenario**
  - Employee says his leave was improperly deducted.
- **Troubleshooting steps:**
  1. CATS\_DA → Display the relevant period for the employee.
  2. ZNCTIME → Open a new session to display the Time Statement for the relevant period.
- **Things to look for:**
  - Look for leave recorded in CATS and corresponding Leave activity on the time statement.
- **Most likely causes:**
  - Keying error on initial entry or leave offset
- **FIX:**
  - Correct initial entry errors, re-run time evaluation (or wait 1 day)

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**Work instructions:** Display Working Times – CATS\_DA and Time Statement – ZNCTIME

## Notes

## 4:3 - Exercise

- **Troubleshooting Improper Accrual – PT50 & PA61**
- **Scenario**
  - Employee says his accrual was incorrect. Says he has passed his 10 yr anniversary date and should be accruing at the 10 yr rate.
- **Troubleshooting steps:**
  1. PT50 → Quota Overview to view accrual details on the Accruals tab
  2. PA61 → Open a new session to display Time Data. Review creditable service - Infotype 552 and Infotype 41



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**Work instructions:** Quota Overview – PT50 and Display Time Data – PA61

Errors in Service Dates should be referred to the HR Master Data Maintainer for research or correction.

## Notes

## Knowledge Check

T	F	Question
<input type="checkbox"/>	<input type="checkbox"/>	1. Employees will be paid for everything recorded in CATS.
<input type="checkbox"/>	<input type="checkbox"/>	2. CATS_DA is capable of showing a list of employees.
<input type="checkbox"/>	<input type="checkbox"/>	3. Time Statements are always available.
<input type="checkbox"/>	<input type="checkbox"/>	4. Leave that has been offset will show in CATS_DA.
<input type="checkbox"/>	<input type="checkbox"/>	5. Time Statements display compensation.



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## Notes


## Lesson Review

In this lesson, you learned to:

- Review Time and Leave entries with transaction CATS\_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.

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## Notes

## Course Review

In this course, you learned to:

- Describe the Quotas available to employees.
- Describe and execute the process for quota corrections.
- Describe and execute the maintenance of FMLA-relevant absences.
- Perform basic quota reporting and troubleshooting.



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## Notes



## Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.



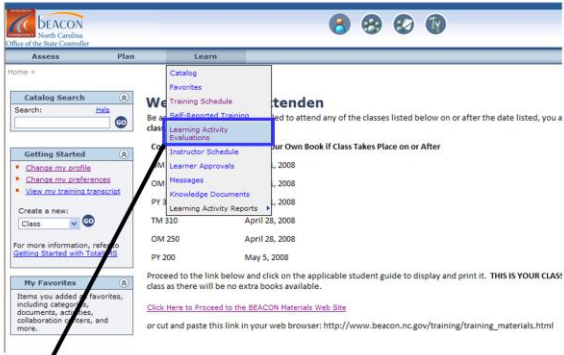
**Training Schedule**

**Self-Reported Training**

**Learning Activity Evaluations**

**Instructor Schedule**

**Learner Approvals**



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## Level 1 Evaluations


The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

## Notes

## Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: <http://www.ncosc.net/BEST/>
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
  - URL: <https://mybeacon.nc.gov>
  - Client 899
  - Use your current NCID user name and password



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## Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.



Keep your training materials close by as a ready reference.

### **Want to practice what you have learned from your desk?**

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

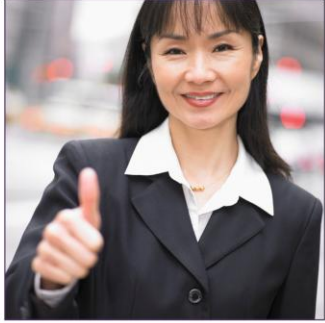
### **Need transactional assistance after go live?**

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.



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# CONGRATULATIONS



You have completed the course


Please complete your course evaluation!

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## Notes

## Demonstration and Exercise Summary



Transaction	Description	Type	Page #
PT50	Quota Overview	D+W	36, 37
PA61	Quota Adjustments	D+E	41,43
PA61	Advanced Leave	W	42
PA61	Convert CSL to CSL Tutoring	W	45
PTFMLA	Create PTFMLA Event	D	55
PTFMLA	Apply Absences	W	56
CATS_DA	Display Working Times	W	64
CATS_DA & ZNCTIME	Troubleshooting Improper Leave Deduction	D	68
PT50 & PA51	Troubleshooting Improper Accrual	D	69

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Type:

**D** - Demo

**E** - Exercise

**W** - Walkthrough

**Notes**